

REQUIRED DOCUMENTS:

Last year's tax returns

Social Security Numbers (including spouse and children) copies of SSN card

Income Documents

W-2 forms

Interest income statements (form 1099-INT & 1099-OID)

Dividend Income statements (form 1099-DIV)

State and local income tax refund (form 1099-G) Alimony received

Business income (for on-post child care or Less than \$1,500 with no inventory ONLY)

Receipts and documentation for all business related expenses (for on post daycare expenses)

Proceeds from broker transactions (form 1099-B)

IRA distribution (form 1099-R)

Pensions and annuities

Rental property income and expenses (Complete the Rental Property Worksheet available on the JAG Website)

Unemployment compensation (form 1099-G)

Gambling and lottery winnings

Miscellaneous income (form 1099-MISC)

Moving expenses

Alimony paid

IRA, SEP, SIMPLE and other retirement plan contributions

Student loan interest paid

Mortgage interest (form 1098)

Education expenses

Itemized Deductions

Medical and dental expenses (to include mileage records)

Home equity loan interest

Real estate taxes paid

Sale of your home or other real estate (form 1099-S; if the home was ever a rental property you must go to a commercial tax preparer. Bring your closing document)

Auto mileage log

Charitable donations (cash and in-kind)

Tax Return preparation fees

Credits and Payments

Child care expenses

Qualified residential energy saving expenses

2017 estimate tax payments